mindset
Business Psychology Services

WELLBEING ACTION PLAN

2023

Guide for people in the workplace

INTRODUCTION

A Wellbeing Action Plan is a tool to help individuals identify what they can do to promote their mental health and wellbeing. It is a practical and personal plan that is beneficial for both employees and employers to promote a more positive work environment.

Using a Wellbeing Action Plan at work can be helpful for several reasons:

- It helps you to prioritise your own wellbeing and self-care by identifying the areas of your work that are causing you stress and gives you practical steps to manage and reduce that stress
- It increases job satisfaction, productivity, job performance and a more positive attitude towards work
- If you choose to share your action plan with your manager or HR department it can help open up lines of communication about your needs and concerns, leading to a more supportive work environment
- It encourages you to set realistic goals and take action towards achieving them. This can help you feel a sense of accomplishment and purpose at work
- Taking care of your wellbeing can help to reduce absences and improve your overall health. When you are healthy and well, you are more likely to enjoy coming to work and be productive

OVERVIEW

A Wellbeing Action Plan is personal and flexible, so you can modify this template to fit your own needs and goals. Follow this six-step guide:

Identify areas of stress

Take some time to identify the areas of your job that cause you stress. This could include workload, deadlines, conflicts with coworkers or sensory triggers.

Set goals

Identify some realistic goals that you would like to achieve to achieve to improve your wellbeing at work, such as taking sufficient breaks or improving time management.

Identify and prioritise actions

Think about what you might need to achieve your goals. This could be things like using a to-do list, having a timer on your desk or wearing noise-cancelling earplugs.

Create an action plan

Write down your goals and actions that you will take to achieve them. Make sure you set a timeframe for each action and schedule them into your calendar.

Share your plan

If you feel comfortable, share your Wellbeing Action Plan with your manager or HR department. This can help them to understand your needs and provide you with support.

Review and adjust

Regularly review your action plan to see how you are progressing towards your goals. If necessary, adjust your plan and make changes to ensure you are staying on track

STEP 1: IDENTIFY STRESS

1. Take some time to identify the areas of your life that cause you stress. Once you have identified the sources of stress you can start to develop an action plan.

Are there certain situations or people that cause you stress? What can make you feel overwhelmed? List things in your life that contribute to your stress (work, relationships, physical health, neurodiversity, etc.)

In order to fulfil their legal obligation to protect their employees at work, your employer may need to break confidentiality if you are at risk of harm.

2. What are your current or intended working arrangements?

Highlight your working arrangements here including your intended working hours and location.

3. What is your preferred working style? Are there any characteristics you think would be useful to know?

Think about communication, time management, collaboration, creativity, use of technology, and adaptability.

There is no one "right" way to work. Communicating your working style can help us support you and achieve better outcomes at work.

4. How do these triggers impact you? Tick the symptoms that you experience most frequently and/or add your comments below:

Cognitive

- ☐ Difficulty staying focused
- ☐ Forgetfulness
- ☐ Negative thoughts
- ☐ Perfectionism
- ☐ Difficulty making decisions
- ☐ Uncharacteristic errors
- ☐ Poor organisation

Emotional

- ☐ Sadness
- ☐ Anxiety
- ☐ Irritability or anger
- ☐ Increased sensitivity
- ☐ Feeling overwhelmed
- ☐ Paranoia
- ☐ Loneliness

Behavioural

- ☐ Changes in sleep patterns
- ☐ Changes in appetite
- ☐ Avoiding situations/withdraw
- ☐ Substance misuse
- ☐ Self-harm
- ☐ Repetitive behaviours
- ☐ Panic attacks

Physical

- ☐ Tiredness and fatigue
- ☐ Headaches
- ☐ Digestive problems
- ☐ Muscle tension and/or pain
- ☐ Increased heart rate/pulse
- ☐ Sweating/clammy hands
- ☐ Rashes, eczema, psoriasis

It's important to note that everyone experiences their symptoms differently, so please add anything else you wish here.

5. How might these symptoms impact you at work?

How do these symptoms impact you working from home, on or off-site? How might your colleagues spot signs?

It is important to prioritise your mental health and wellbeing and seek support if you are experiencing symptoms that are impacting your work life. Many workplaces have resources available such as Employee Assistance Programmes, mental health benefits or Mental Health First Aiders.

If you are experiencing symptoms that impact your daily life, it may be helpful to **speak with a doctor or healthcare professional** who can help you manage your overall health.

STEP 2: SET GOALS

6. Identify 1-3 goals that you would like to achieve to improve your wellbeing. Make sure your goals are SMART: Specific, Measurable, Achievable and Time-bound.

Goal 1:

Goal 2:

Goal 3:

STEP 3: LIST ACTIONS

7. List the actions that you can take to achieve your goals. Make sure your actions are realistic and achievable in line with your SMART goals. Then choose the actions that are most important to you and that will have the biggest impact on your wellbeing.

What can you do to address your stressors or minimise their impact?

8. What do you need from your manager or the workplace to support you and achieve your goals?

Examples: flexible work arrangements, frequent breaks, assistive technology, offering counselling or additional training.

Your HR department can help you with ideas for reasonable adjustments. It is important to remember that employers have a legal obligation to make reasonable adjustments under the Equality Act 2010 (UK) to ensure employees are not disadvantaged in the workplace. These will be made on a case-by-case basis. At times, it may not be possible to provide all of the requested adjustments.

Finally, choose any actions that are most important to you and prioritise what will be most impactful.

STEP 4: ACTION PLAN

Write down your key goals and the actions that you will take to achieve them. Make sure to agree who is the owner or responsible person(s) and a timeframe.

Name: _____

Date: _____

Date of next review: _____

Action or commitment	Owner	Timeframe

Action or commitment	Owner	Timeframe

Remember to put dates in your calendar or add actions to your to-do list to help keep on track!

STEP 5: SHARE THE PLAN

Sharing your Wellbeing Action Plan at work can be beneficial for both yourself and your colleagues. It can help you communicate your needs and goals and can help to raise awareness and reduce stigma around mental health and wellbeing in the workplace.

Sharing your Wellbeing Action Plan is a personal decision and you should only share what you feel comfortable. You could share it with your manager, HR representative or a trusted colleague who can provide support and guidance. You may even find it useful to share it with trusted friends and family.

Your action plan will generally be treated as confidential and stored securely, just like other medical information. It will only be shared with those you choose to share it with, or at times if there is a legitimate need to know in order to provide the agreed support or accommodations.

If you have any requests regarding the sharing and confidentiality of this plan, please state this below:

STEP 6: REVIEW/ADJUST

Reviewing a Wellbeing Action Plan is an important part of the process, as it allows you to track your progress, identify any changes in your mental health and wellbeing needs, and adjust your goals accordingly.

A Wellbeing Action Plan is an ongoing progress and is flexible and adaptable as your needs change over time. Regularly reviewing and updating your plan ensures that you are taking proactive steps to support your wellbeing. Here are some steps you can take to review your Wellbeing Action Plan:

- Decide on a regular schedule for reviewing your Wellbeing Action Plan, such as once a month or every quarter
- Reflect on your progress since your last review. Celebrate your successes and think about any barriers or challenges you have faced. Be kind and avoid criticism if something has not gone to plan
- Think about any changes in your mental health and wellbeing needs since your last review. For example, you may have experienced new stressors, or you may have made progress managing your symptoms
- Evaluate the effectiveness of your current goals and actions and whether they are still relevant and effective in supporting your mental health and wellbeing needs. Identify any goals or actions to change
- Revise the goals and actions as needed. Set new goals and identify new actions that will support your current needs
- Set a plan for the next review and schedule it in your calendar